

44-260.J. Transitioning AR/CO Cases

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CPG Letters 284 (3/13); 303 (10/13); 309 (1/14)

44-260.J.1 Transitioning between AR and SAR

Under certain circumstances, a CalWORKs case may transition between Annual Reporting (AR) and Semi-Annual Reporting (SAR).

The following are situations that may result in a CalWORKs case transitioning between AR and SAR:

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- When certain sanctions are imposed or lifted;
- When adults become timed-out or added back to the AU due to Child Support reimbursement or overpayment recoupment; or
- When an adult moves into the home and is added to the AU.

IMPACTS FOR ASSOCIATED CALFRESH CASES

Changes in the reporting status for a CalWORKs AR/CO case may not always impact the associated CalFresh case.

ACL 12-25; 12-49

44-260.J.2 Informing Notices

When a case transitions from AR to SAR or from SAR to AR, recipients must be given sufficient notice of their new reporting and budgeting rules, via the following notices:

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- For CalWORKs AUs transitioning from SAR to AR/CO: **Your CalWORKs Reporting Rules Have Changed (SAR to AR/CO Notice, CW 2211)**
- For CalWORKs AUs transitioning from AR/CO to SAR: **The Rules for Your CalWORKs Case Have Changed (AR/CO to SAR Notice, CW 2212)**

ACL 12-25; 12-49; 13-80

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Rules for
Cases that
Transition

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The following rules apply when a CalWORKs case transitions between AR and SAR:

- The case will continue to have the same reporting cycle and redetermination date, depending on the original reporting system of the case.
- SAR cycles will be assigned as follows:

If CalWORKs was approved as...	Then the reporting cycle will be based on...
Quarterly Reporting	The date of application
Annual Reporting or Semi-Annual Reporting	The beginning date of aid

- A SAR 7 **cannot** be due in the same month in which an adult is being added back to the AU.
- The next SAR 7 will be due in the SAR period **after** the adult is added to the AU, unless the annual redetermination is due.
- A SAR 7 will **not** be required for any month in which the AU met AR/CO criteria.
- In cases where a SAR 7 is due in one month but transitions to AR in the **following** month, if the recipient fails to submit a complete SAR 7, the case will **not** be discontinued and the grant will remain unchanged.
- When a case transitions from SAR to AR, the case will become an AR/CO case effective the 1st of the month after the adult is removed from the AU.
- When there is a change in IRT, the appropriate IRT notice will be issued as follows:
 - For AR/CO AUs that do not receive CalFresh or have CalFresh CR status: **Reporting Changes for CalWORKs and CalFresh (AR 2)**
 - For AR/CO AUs that have CalFresh SAR status: **Reporting Changes for CalWORKs and CalFresh (AR 2 SAR)**
 - For AUs that have transitioned to SAR: **Reporting Changes for Cash Aid and CalFresh (SAR 2)**

Example 1: Non-Needy Caretaker Relative Requests CalWORKs	
Scenario	<p>An AU of 2 consists of a non-needy caretaker relative and 2 minor children.</p> <p>On June 2nd, the non-needy caretaker relative reports she lost her job and is now requesting CalWORKs for herself.</p>
Outcome	<p>After she has met all CalWORKs eligibility requirements, the non-needy caretaker will be added to the AU effective July 1st.</p> <p>The SAR cycle and redetermination date in CalWIN remain unchanged.</p> <p>The Human Services Specialist (HSS) will issue the following forms:</p> <ul style="list-style-type: none"> • CW 2212 to inform the recipient of the change to SAR reporting responsibilities; and • SAR 2 if there is a change in IRT, per CPG 44-270.A.6.

Example 2: Timed-out Parent becomes eligible to CalWORKs	
Scenario	<p>An AU of 1 consists of timed-out Mom and her minor child. This is a Safety Net case.</p> <p>During the automated Child Support reimbursement process in May, a lump-sum amount is applied to the case and used to repay four months of aid.</p>
Outcome A	<p>Effective June 1st, Mom is automatically added back to the AU.</p> <p>The SAR cycle and redetermination date will remain unchanged.</p> <p>The HSS will issue the following forms:</p> <ul style="list-style-type: none"> • CW 2212 to inform the recipient of the change to SAR reporting responsibilities; and • SAR 2 if there is a change in IRT, per CPG 44-270.A.6.
Outcome B	<p>If there is no additional child support reimbursement, Mom will be discontinued from the AU effective September 30th and the CalWORKs case will transition from SAR back to AR/CO effective October 1st.</p> <p>The HSS will issue the following forms:</p> <ul style="list-style-type: none"> • CW 2211 to inform the recipient of the change to AR/CO reporting responsibilities;

	and <ul style="list-style-type: none">AR 2 (or AR 2 SAR) if there is a change in IRT, per CPG 44-270.J.3.
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ACL 12-25; 12-49; 12-49 Errata; 13-80

**44-260.J.5
Questions
and Answers**

Additional information and clarification may be found in [CPG 45-000.B](#)
– **Annual Reporting/Child Only (AR/CO) Q&A.**

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